



MININGER INCOME TAX & FINANCIAL SERVICES

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Welcome to the Client Portal

Our **Client Portal** creates an instant and secure online channel of communication between you and our office. To best insure your privacy, and in keeping with current federal privacy laws, we cannot fax or email documentation that contains personally identifiable information. Client portals provide a secure, encrypted exchange of your financial information.

Portal Feature	Client Benefit
Check the Status of Your Tax Return	Track the ETA of your tax refund.
Get a copy of your completed tax return	Need a copy of your tax return but misplaced your folder? By law, we cannot fax or email tax returns. Get a copy of your return when you need it – 24/7/365. No need to drive to our office.
Exchange files with your tax preparer	Have you ever forgotten to bring a document to your tax appointment? Save time - don't drive back to our office – upload the document to your account via your private portal.
Get a copy of your source documents.	Have you ever needed a copy of your W2 or mortgage interest statement, but didn't have time to drive to our office? Access your documents at your convenience 24/7/365.
Update your contact information	Did you move? Change your email address? Allow us to stay in touch. Update your contact information at your convenience.

TO ACCESS THE CLIENT PORTAL:

1. Go to www.miningertax.com
2. Click the **[Client Portal]** tab on the navigation bar
3. Click **[CLICK HERE TO LOGIN]** – you will be directed to the Client Portal Login screen
4. Enter the primary taxpayer's SSN (no dashes)
5. Click < **Need a Password or Forgot Password?** >

*Follow the instructions on the screen ... you will be prompted to enter your email address – **USE THE PRIMARY taxpayer's email address** and primary taxpayer's SSN (no dashes) , then Click <**GO**>. A temporary password will be sent to your primary email account.*

6. Click <**GO**> - you will be redirected to the **Client Portal Login** screen
7. Enter the primary taxpayer's SSN (no dashes), then enter your system generated temporary password - Click <**GO**>
8. **You will immediately be directed to change your password to a unique password.**
9. **IMPORTANT:** when you're done using the portal, click <Logout>

Having difficulty logging in? Contact our office at 215-536-6829.